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Agenda Item 6c

August 16, 2011

TO: MEMBERS OF THE BENEFITS AND PROGRAM ADMINISTRATION COMMITTEE

- I. SUBJECT:** Customer Services and Support Performance Measures
- II. PROGRAM:** Customer Services and Support
- III. RECOMMENDATION:** Information
- IV. ANALYSIS:**

Attached are the FY 2010-2011 Fourth Quarter Customer Services and Support Performance Management dashboard reports. The summary status report from the most recent quarter is provided as Attachment A. The dashboard reports for the most recent quarter are provided as Attachment B.

Customer Service and Outreach reports a total of nine dashboards for performance measures related to customer service and telephone contact. Four of these dashboards, Attachments B-1 ER through B-4 ER, relate to employer inquiries. All four of these dashboards are on target.

Attachments B-1 through B-5 reflect measures for member inquiries. Attachment B-2, call answer rate, has improved from yellow to green. Attachment B-3, average wait time, remains yellow. Call volumes continued to be higher in the last quarter, with approximately 16,500 additional calls received over the same quarter from the previous year. Call volumes centered around health benefit and service credit costing are a reflection of health care and pension reform issues. Training for my|CalPERS began in May and June, also impacting the ability to meet service levels for call wait times.

The Customer Account Services Division reports six dashboards for performance measures related to service credit cost requests, elections to purchase service credit, and retirement estimates, Attachments B-6 through B-11.

Attachments B-6 and B-7 relate to service credit cost requests. Attachment B-6 compares the number of cost requests completed during the quarter to the number of requests received. Due to my|CalPERS training required by all staff during the quarter, we only completed 78 percent of costs requests compared to the number of requests received. Attachment B-7 represents the percentage of requests that were completed within 90 days of receipt. Our goal is to complete 95 percent within 90 days of receipt, however, during the third quarter, we were only able to complete 71 percent within 90 days.

This was due to the high volume of cost requests that were received during the quarter, the current backlog, and the redirection of staff to the Pension System Resumption Project.

Attachments B-8 and B-9 pertain to service credit elections. Attachment B-8 compares the number of service credit elections completed to the number of elections received during quarter. We slightly exceeded this goal by completing 1 percent more requests than were received. Attachment B-9 represents the percentage of service credit elections processed within 30 days of receipt. Our goal is to complete 95 percent of elections within 30 days, however, during the 4th quarter, we were only able to complete 91 percent of elections within 30 days of receipt. The number of constraint cases in which we are waiting for required documents from financial institutions and members in order to complete the election request, has impacted this metric.

Attachments B-10 and B-11 relate to retirement estimate requests. Attachment B-10 reflects the percentage of requests for retirement estimates are completed within 5 days of receipt. We were unable to meet our goal for the 5-day completion rate due to the very high volume of estimate requests we received this quarter. Further, redirection of staff resources to the Pension System Resumption Project and my|CalPERS training activities has impacted this completion rate.

Attachment B-11 reflects the percentage of requests for retirement estimates completed within 30 days of receipt. Staff completed 100 percent of requests within 30 days of receipt, representing the sixth straight quarter they have achieved a completion rate of at least 97 percent. At this time, no backlog exists for this workload.

Benefit Services Division reports seven dashboards for performance measures related to service and disability retirement, allowance adjustments, pre and post retirement death benefits, and refunds, Attachments B-12 through B-18. Disability retirement determinations (B-17), remains green with 75 percent of determinations made within 6 months of receipt of a complete application. The program has maintained the Board-Approved Effectiveness Measures this fiscal year. Additionally, the program has maintained an average of 85-90 percent of workable cases below the six-month time frame. During the fourth quarter, service retirement allowance adjustments (B-13) returned to green. We will continue to monitor each workload for sustained performance as more focused attention is directed to the Pension System Resumption Project in the coming months.

V. STRATEGIC PLAN:

This project supports the CalPERS Strategic Plan. The performance measurements described in the attachments are directly aligned to the CalPERS strategic goals.

VI. RESULTS/COSTS:

These Performance Management dashboard reports were implemented in the fourth quarter of fiscal year 2006-07 to replace the Effectiveness Measures previously reported to the Board. There are no new costs associated with the implementation and administration of the new Performance Management process.

DONNA RAMEL LUM
Deputy Executive Officer
Customer Services and Support

Attachments